- Nickelodeon uncorks new programming style
- Caution signs thrown at joint ventures
- Industry remains bullish on advertising
- 'Blue sky' promises spell franchise doom

CableVision

The news and features weekly of the cable television industry November 1, 1982 $3.00

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Gambling on consolidation

Regional focus reveals high level of activity

CableVision | November 1, 1982. Volume 8, Number 9

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Roy Acuff

Nashville swing

Amidst a honky-tonk hoedown atmosphere, officials behind The Nashville Network reveal ambitious programming plans and predict the biggest launch ever of an ad-supported service come spring. **Leading the week, pages 13-17.**

New fees

The Copyright Royalty Tribunal released new royalty rates for distant signal use. Cable representatives claim the new fees may be prohibitive for operators wanting to pick up additional distant signal programming. **Leading the week, pages 13-17.**

Election time

Most of the members of Congress who deal with telecommunications issues are expected to be returned to their seats but not all. **Leading the week, pages 13-17.**

Denver lawsuit

The Denver franchise award has become the subject of legal action again. This time the Mountain States Legal Foundation, a group formerly led by James Watt, has initiated the lawsuit. **Leading the week, pages 13-17.**

Clout that counts

Use your political and legal clout was the unofficial theme of the week when cable operators gathered in Tulsa, Okla., for the Mid-America Cable TV Association's 25th annual meeting. **Leading the week, pages 13-17.**

European complement

Gustave Hauser, chairman and CEO of Warner Amex Cable Communications, addressed a major gathering of European newspaper publishers and executives in Copenhagen, Denmark, last week. His message was that cable will complement the print industry. **Leading the week, pages 13-17.**

Scrambled venture

Oak Industries and the Telstar Corp. have formed a joint venture to market Oak's ON TV pay programming service to MDS, SMATV, STV and cable systems nationwide. **Leading the week, pages 13-17.**

Nickelodeon trio

Three new series are being aimed at capturing the imagination of children while luring the attention of adults and corporate underwriters. **Page 19.**

Creative thinking

Heads of leading advertising agencies agreed that cable needs to work hard to reach the dollar potential expected from the industry. Those savants were gathered at a CAB seminar in Chicago last week. **Page 29.**

Joint venturing

The joint venture approach to the "new media" is becoming more important but media businesses are being encouraged to choose partners carefully. **Page 31.**

Beware of promises

City officials and MSO franchising departments are guilty of letting "blue sky" promises dictate franchise awards. Those were the words of industry and municipal experts at a seminar sponsored by the Illinois Institute for Legal Education. **Page 102.**

Commissioner, at last

After waiting several months while his nomination to the FCC hung in limbo, Stephen Sharp finally has gained his post and is ready to administer a deregulatory thrust. **Page 105.**

About the cover

Atlantic City will play host to the Atlantic show. Freelance photographer Jeffrey Asher provided this "boardwalk" shot.

This week in PLUS

Every joyride has to end, including cable's stock market joyride. Gary Rothbart talks with Wall Street analysts who agree that the outlook for cable stocks is positive but who don't expect cable to be breaking any records. They also speculate on what stocks will and won't do well. . . . Next, *CableVision Plus* Editor Victoria Gits takes a look at the home video market. More and more people are buying and renting videocassettes and discs for now, but what will they do when pay cable comes to town? In the long run, when it comes down to a choice, which will wir, video or cable? Pages 51-74.

Special Report

Thursday, October 27

9 a.m.-Noon Exhibits Open

9-10:30 a.m. "Local Programming: What Is Its Place?" *Moderator:* Gregory Vandervoort, director of local programming, Suburban Cablevision. *Panel:* Anne Darlington, director of program planning, Maryland Center for Public Broadcasting; Barry Mines, director of programming, Viacom Cablevision of Long Island; Hal Leu, manager, local origination, Howard County Cable (Monticello Park, Fairmont Park)

9-10:30 a.m. "The Legislative and Regulatory Issues Affecting the States." *Moderator:* Nancy Becker, executive director, NJCTA. *Panel:* Melvin Zimmer, chairman, Governmental Operations Committee, New York State Assembly; Barbara Curran, president, Board of Public Utilities, Department of Energy; Assemblyman Walter Kern Jr. (N.J.); Harold Etsell Jr., vice president of operations in marketing, UltraCom Inc. (Tivoli Garden, Berkshire Garden)

10:30-10:45 a.m. Coffee Break (Exhibit Hall)

10:45 a.m.-12:15 p.m. "Refranchising: Strategies for Survival." *Moderator:* Thomas Bird, vice president of cable systems development, Rollins Cablevue Inc. *Panel:* Rita Valentino, vice president, Auburn Cablevision Inc; Gary Hurvitz, vice president of regulatory affairs, Malarkey-Taylor Associates; Susan McAdams, director, telecommunications projects, National League of Cities; Stuart Brotman, president, Communication Strategies Inc. (Monticello Park, Fairmont Park, Central Park)

10:45 a.m.-12:15 p.m. "Theft of Services: Preventing Loss of Your Dollars." *Moderator:* Jim Bailey, Cable Tel. *Panel:* Donald Mitzner, president, Group W Cable Manhattan; Denis Dillon, district attorney, Nassau County, N.Y.; Peter Schwab, vice president, customer services, International Cable; Ed Horowitz, vice president of studio and network operations, Home Box Office; John Sie, senior vice president, sales and planning, Showtime Entertainment (Tivoli Garden, Berkshire Garden, Imperial Garden)

12:30-2:30 p.m. Philadelphia Block Party (Claridge Hotel, Stratford Ballroom)

Regional focus

	Delaware	Maryland	New Jersey	New York	Pennsylvania	Total
Number of systems	8	41	57	185	360	651
Number of communities served	46	123	387	776	1,280	2,612
Basic subscribers	107,312	216,836	1,013,710	1,925,296	1,642,428	4,905,582
Pay units	39,840	157,561	754,488	776,445	450,936	2,179,270
Homes passed	183,043	390,562	1,990,373	2,835,124	2,529,900	7,929,251
Plant miles	2,841	5,013	72,123	32,480	81,362	193,819
Basic/HP	58.6%	55.5%	50.9%	67.9%	64.9%	61.9%
Pay/basic	37.1%	72.7%	74.4%	40.3%	27.5%	44.4%
Subs per mile	37.8	43.3	14.1	59.3	20.2	25.3
Homes per mile	64.4	77.9	27.6	87.3	31.1	40.9

Atlantic region boasts corporate headquarters

Delaware

Cable System Survey Co., Inc.
1334 Cypress Ave.
Wilmington, 19805
(302) 994-4765

Catel Expo
127 N. Broadway
Wilmington, 19801
(516) 543-6189

Video Cableservices Inc.
2415 Concord Pike
Wilmington, 19803
(302) 478-4887

Maryland

COMSAT M & S Center
22250 Comsat Dr.
Clarksburg, 20871
(301) 428-4285

Commercial Credit Leasing Corp.
301 N. Charles St.
Baltimore, 21201
(301) 332-3000

Custom Antenna Service Inc.
7636 Airpark Rd.
Gaithersburg, 20878
(301) 948-5931

Hallmark Cable Associates
P.O. Box 5830
3703 Old Court Rd.
Pikesville, 21208
(301) 484-2030

Knox Video Products
5001-I Forbes Blvd.
Lanham-Seabrook, 20706
(301) 459-2106

Mastercom
12321 Wilkins Ave.
Rockville, 20852
(301) 957-3697

Microdyne Corp.
P.O. Box 1527
Rockville, 20850
(301) 762-8500

Satellite-TV Services Ltd.
12321-A Wilkins Ave.
Rockville, 20852
(301) 984-1670

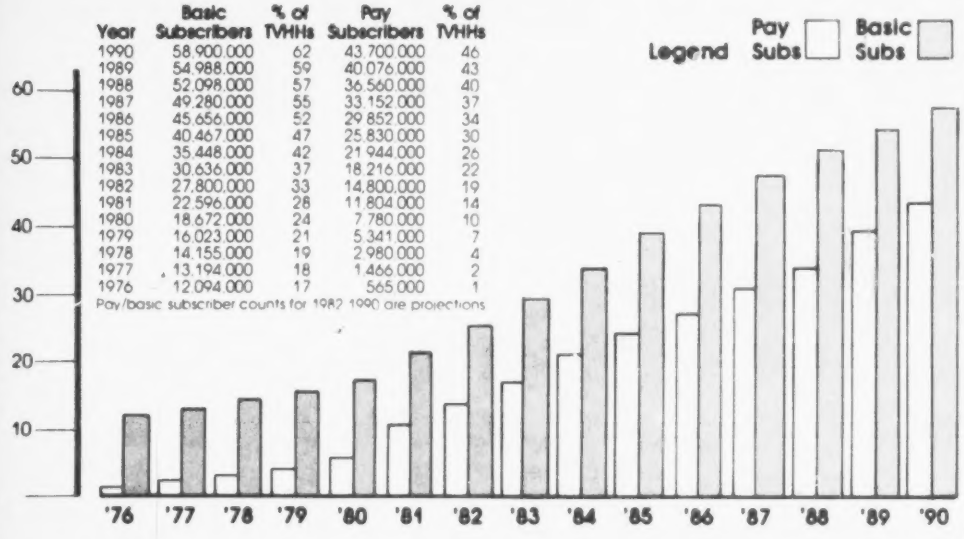
(Continued on page 47.)

Cable stats

Pay/basic cable growth

Year	Basic Subscribers	% of TVHHs	Pay Subscribers	% of TVHHs
1990	58,900,000	62	43,700,000	46
1989	54,988,000	59	40,076,000	43
1988	52,098,000	57	36,560,000	40
1987	49,280,000	55	33,152,000	37
1986	45,656,000	52	29,852,000	34
1985	40,467,000	47	25,830,000	30
1984	35,448,000	42	21,944,000	26
1983	30,636,000	37	18,216,000	22
1982	27,800,000	33	14,800,000	19
1981	22,596,000	28	11,804,000	14
1980	18,672,000	24	7,780,000	10
1979	16,023,000	21	5,341,000	7
1978	14,155,000	19	2,980,000	4
1977	13,194,000	18	1,466,000	2
1976	12,094,000	17	565,000	1

Pay/basic subscriber counts for 1982-1990 are projections



Cable barometer

Television households (TVHH) 82,100,000

Homes passed by cable (HP) . 44,732,230

Percent of TVHH passed by cable 54.5%

Basic cable subscribers . 26,421,666

Percent of TVHH with basic cable 32.2%

Percent of HP with basic cable 59.1%

Pay cable units 14,026,919

Percent of TVHH with pay cable 17.1%

Percent of HP with pay cable 31.4%

Percent of basic subs with pay cable .. 53.1%

Figures are as of August 1982

Satellite-fed cable programming services

Basic services	Affiliates*	Subscribers*	% change in subs from 8/30	
ACSN: The Learning Channel	262	1,843,352	3	
Alpha Repertory Television Service (ARTS)†	1,725	8,000,000	7	
Black Entertainment Television (BET)	122	2,000,000	N.A.	
Cable Health Network (CHN)	N.A.	N.A.	N.A.	
Cable News Network (CNN)	2,807	15,287,000	4	
CNN Headline News	270	1,904,640	19	
Cable Satellite Public Affairs Network (C-SPAN)	1,000	10,500,000	5	
CBN Cable Network	3,245	18,200,000	2	
CBS Cable	504	5,000,000	N.C.	
Daytime	515	7,244,313	7	
Dow Jones Cable News	60	640,000	7	
Electronic Program Guide (EPG)	58	821,490	61	
The Entertainment Channel (TEC)	31	N.A.	N.A.	
Entertainment and Sports Programming Network (ESPN)	4,586	18,780,114	4	
Eternal Word Television Network (EWTN)	33	600,000	6	
Financial News Network(FNN)	590	760,000	12	
Modern Satellite Network (MSN)	427	5,731,910	9	
Music Television (MTV)	825	6,750,000	13	
National Christian Network	72	1,690,377	24	
National Jewish Television	98	2,146,100	1	(8/33)
Nickelodeon	1,850	9,000,000	3	
North American Newstime/ The Travel Channel	114	876,000	N.A.	(7/30)
PTL Television Network	600	6,500,000	18	
Reuters News View	375	3,500,000	N.A.	
Satellite News Channel I (SNC)	342	3,292,130	6	
Satellite Program Network (SPN)†	410	4,757,126	N.A.	(8/30)
SIN Television Network‡	199	25,531,004	6	
Trinity Broadcasting Network	231	2,267,000	1	
USA Network	2,300	13,000,000	8	
The Weather Channel (TWC)	550	6,000,000	18	
WGN	3,389	9,448,079	2	
WOR	655	4,337,824	2	
WTBS	4,699	23,324,000	6	
Basic audio services				
Lifestyle	75	700,000	1	
WFMT	158	874,862	2	
Pay services				
Bravo	41	70,194	N.A.	(8/30)
Cinemax	900	1,500,000	N.C.	
EROS	12	50,000	N.C.	

Pay services	Affiliates*	Subscribers*	% change in subs from 8/30	
GalaVision	145	100,000	N.C.	
Home Box Office (HBO)	3,600	10,000,000	1	
Home Theater Network Plus	200	155,000	N.A.	(6/30)
The Movie Channel (TMC)	2,150	2,200,000	N.C.	
The Playboy Channel	176	278,200	N.A.	(8/30)
Showtime	1,900	3,500,000	N.C.	

* Affiliate and subscriber counts are as of Sept. 30, 1982, unless otherwise noted.
†Subscriber count denotes households receiving signal.
‡Total SIN reach. Estimated Spanish-speaking households (including broadcast stations and translators): 3,750,900.
N.A. designates not available.
N.C. designates no change.

Announced satellite-fed cable services	Projected launch date
ABC/ESPN Pay Service	T.B.A.
Aimi Group Network	T.B.A.
Apollo Entertainment Television	T.B.A.
The Buena Vision Channel	1st quarter 1983
Cable Newspaper Corp.	1/83
The Channel Black	T.B.A.
Christian Media Network	relaunch T.B.A.
Cinemerica	T.B.A.
The Community Channel	T.B.A.
The Disney Channel	2nd quarter 1983
Family Programming Network	T.B.A.
Heartbeat Media Network	4th quarter 1982
Home Music Store	1983-84 launch
The Job Channel	T.B.A.
Kidvid Network	1/83
Rock 24 (Lewmark Productions Music)	6/83
Magicable	3rd quarter 1984
Nashville Network	2/83
National Jazz Network	1982
PBS Cable	T.B.A.
Penthouse Entertainment Network	T.B.A.
Satellite News Channel II	2nd quarter 1983
The Silent Network	3/83
Sitcom Channel (Channeltainment)	1st quarter 1984
Spanish Universal Network	T.B.A.
SPN/International Network	2nd quarter 1984
SPN/Financial-Religious Network	2nd quarter 1984
SPN/Classic Movie Network	2nd quarter 1984
SPN/How-To Network	2nd quarter 1984
Top Entertainment Network	T.B.A.
UTV Cable Network	1/83
Video Concert Hall	T.B.A.
Window	T.B.A.

Film product comparison—November

Film	Pay Networks				Distributor
A Challenge for Robin Hood		ST			(C) Warner Bros.
Adventures of the Wilderness Family	HBO*		TMC*		Simcom
All Night Long		ST*			Universal
All the Fine Young Cannibals		(ST)		HTN*	MGM/UA
Altered States		(ST)	TMC		Warner Bros.
Animals are Beautiful People					C* Warner Bros.
Any Number Can Play					C* MGM/UA
Any Which Way You Can	HBO	(ST)	(TMC)	(HTN)	Warner Bros.
Are You in the House Alone?					C Worldvision
The Asphalt Jungle				HTN*	MGM/UA
Baa Baa Black Sheep					C Granada
The Baby Maker		ST			C Warner Bros.
Back Roads		ST	TMC		(C) CBS
Battleground		ST*			MGM/UA
Belle Starr					C Worldvision
Bells are Ringing				HTN*	MGM/UA
Beyond Evil		ST*			Film Gallery
Black Beauty	(HBO)	ST*			Paramount
Blood Barrier			TMC*		Hemdale
Blood Beach		ST	(TMC)		Viacom
Blume in Love					C Warner Bros.
Body and Soul		ST*	(TMC)		C Viacom
Boys' Night Out		(ST)		HTN*	MGM/UA
The Bronte Sisters			TMC		MTV
Bustin' Loose		ST			Universal
Can You Keep It Up for a Week?		ST*			Miramax
Carbon Copy	(HBO)				C Embassy
Catherine and Company					C Film Gallery
Christmas Mountain		ST			Christmas Mountain
Chu Chu and the Philly Flash	(HBO)	(ST)	(TMC)	HTN*	20th Century-Fox
The Cincinnati Kid					C* MGM/UA
The Club		ST*	TMC		Cinaco
The Competition				HTN	Columbia
The Confession				HTN	Paramount
Convoy			TMC		MGM/UA
Cutter's Way	HBO	(ST)			(C) MGM/UA
Danny				HTN	Wombat
Death Valley	HBO*	(ST)	(TMC)		Universal
Don't Go Near the Water				HTN*	(C) MGM/UA
The Dot and the Kangaroo				HTN*	Satori
The Drowning Pool				HTN	C Warner Bros.
Drum					C MGM/UA
Dunkirk		ST			MGM/UA
The Eerie Midnight Horror Show		ST			Viacom
The Elephant Man		ST		(HTN)	C* Paramount
Emily		(ST)			C Atlantic
Enter the Ninja		ST	TMC		Viacom
Escape from New York					C* Embassy
The Exterminator		ST			Embassy
The Eyes of the Amaryllis		TMC			Amaryllis Productions
Fall Line		ST*			Embassy
Falling in Love Again	HBO		(TMC)		Badish
Far from the Madding Crowd	(HBO)	(ST)		HTN*	MGM/UA
Father Figure	HBO				HBO
First Family	(HBO)	(ST)	TMC		Warner Bros.
First Monday in October	(HBO)	ST*	(TMC)	(HTN)	Paramount
The First Time			TMC*		Film Gallery
Foolin' Around	HBO				GGC
For Your Eyes Only	(HBO)	ST*	(TMC)	HTN*	MGM/UA
The Formula	HBO	(ST)	TMC		MGM/UA
The Four Horsemen of the Apocalypse		ST		HTN	C MGM/UA
The Four Seasons	(HBO)			HTN*	Universal
The Gambler (Kenny Rogers version)					C Viacom
The Gathering					C Worldvision
Ghost Story	HBO	ST	TMC		Universal
Good Riddance			TMC		Int'l Film Exchange
Goodbye Emmanuelle		ST			(C) Miramax
Great Adventure	HBO				Simcom
The Great Bank Hoax				(HTN)	C* Warner Bros.
The Great Brain					C* HBO
The Great Muppet Caper	(HBO)				C AFD
The Great Train Robbery			TMC	(HTN)	C* MGM/UA
Gulliver's Travels				HTN	Comith
Halloween II	(HBO)	(ST)	TMC*		Universal
Happy Birthday to Me		ST			Columbia
The Happy Hooker Goes To Washington		ST			(C) Swank
Harper Valley P.T.A.					C April Fool
Heaven Can Wait	(HBO)	ST*	(TMC)	(HTN)	Paramount
Hell's Angels				(HTN)	C* Universal
The High Country		ST	TMC		(C) Crown International
High Ice					C* HBO
House Calls	HBO*	ST*	(ST)	HTN*	Universal
The Howling	HBO	(ST)			Wescom
Hunted in Holland					C Janus
I Go Pogo	HBO		TMC		Stowmar Enterprises
I Love Melvin				HTN	MGM/UA
Ice Castles	HBO	ST			Columbia
I'll Cry Tomorrow				HTN*	(C) MGM/UA
Imitation General		ST			MGM/UA
Improper Channels		ST*	TMC	HTN	Crown International
The Incredible Shrinking Woman	HBO	ST	(TMC)	(HTN)	Universal
The Intruder					C S.J. International
Islands in the Stream	HBO*			(HTN)	C Paramount
The Jazz Singer	HBO*				(C) EMI
The Jungle Book				HTN	Corinth
Just Before Dawn		ST	TMC		Juniper
The Kid from Not-So-Big	(HBO)			HTN*	Film Gallery
King Solomon's Treasure			TMC		Gold Key
La Cage Aux Folles	HBO*				MGM/UA
La Strada					C* Janus
The Last Time I Saw Paris				(HTN)	C MGM/UA
Legend of the Wild	(HBO)	ST			Sunn Classic
Les Girls		(ST)		HTN	C MGM/UA
Lipstick		(ST)			C Paramount
The Little Prince				HTN	Paramount
The Looney, Looney, Looney Bugs Bunny Movie	(HBO)			HTN	Warner Bros.
Loophole	HBO		TMC	(HTN)	Telepictures
Love and Money			TMC		Lorimar
Love Me or Leave Me				HTN*	C MGM/UA
Made in Paris		(ST)		HTN*	MGM/UA
The Man Who Would Be King					C Lorimar
The Meanest Men in the West				HTN	Universal
Melvin and Howard			TMC		Universal
The Merry Widow				HTN	MGM/UA
MGM's Big Parade of Comedy				HTN	MGM/UA
The Million Dollar Face					C* HBO
The Mirror Crack'd				HTN	C EMI
Montenegro		ST			Atlantic
My Bloody Valentine	(HBO)	ST	(TMC)		Paramount
Mystery of the Million Dollar Hockey Puck					C Cinepix
Naughty Wives		ST*			Wrightwood
Never Say Few		ST		HTN	MGM/UA
Nijinski					C* Paramount
Nine to Five		ST	(TMC)	HTN*	20th Century-Fox
North by Northwest				HTN	MGM/UA
Ode to Billy Joe	HBO				Warner Bros.
The Offence					C* MGM/UA
Oh Heavenly Dog	HBO				(C) Mulberry Square
On the Right Track	(HBO)	(ST)	(TMC)	HTN*	20th Century-Fox
One on One	HBO*			(HTN)	Warner Bros.
The Optimists				HTN	Paramount
Ordinary People		ST	(TMC)		C* Paramount
The Outlaw				HTN*	(C) Universal
Paper Tiger				HTN	(C) Castle Hill
The Party					C MGM/UA
The Passenger				HTN	MGM/UA
Paternity	HBO	ST	TMC	HTN	Paramount
Portrait of a Rebel: Margaret Sanger	HBO*				HBO
The Postman Always Rings Twice		ST			Lorimar
Pretty Maids All in a Row		ST			MGM/UA
Prince of the City	HBO	ST	TMC		Warner Bros.
Prisoner of War		ST			MGM/UA
The Pursuit of D.B. Cooper					C* PolyGram
Race for Your Life, Charlie Brown			TMC		Paramount
Raggedy Ann and Andy	HBO				Aurora Films
Ragtime	HBO				HBO
The Rain People					C* Warner Bros.
Raintree County				HTN	C* MGM/UA
Rascal Dazzle	HBO				Castle Hill
Rich and Famous		ST	TMC		C MGM/UA
Rose Marie		ST			MGM/UA
Rough Cut					C Paramount
Royal Flash			TMC		20th Century-Fox
Royal Wedding		(ST)		HTN*	MGM/UA
The Runner Stumbles		ST			Viacom
Schlock			TMC		Cinemasignal
Sea Wolves	HBO*				Lorimar
Secrets of Three Hungry Wives					C Worldvision
Serial		(ST)	TMC		Paramount
Shoeshine					C Film Verhuurk
The Shogun Warriors					
Starvengers		ST			Blum Group
Shoot the Sun Down			TMC		Gold Key
Silence of the North	HBO*		(TMC)	(HTN)	Universal
Silver Streak	(HBO)	(ST)		HTN*	20th Century-Fox
Skirts Ahoy		ST			MGM/UA
So Fine	HBO	ST	TMC		Warner Bros.
Soldiers Three		ST			MGM/UA
Sorcerer			TMC		Paramount
Southern Comfort		ST	TMC		C Atlantic
Sphinx	HBO	(ST)	TMC	(HTN)	Warner Bros.
Spirit of the Wind	HBO	(ST)			Atlantic
St. Ives				(HTN)	C Warner Bros.
Stranger in the House	HBO				Warner Bros.
Stripes	(HBO)	(ST)	(TMC)	HTN*	Columbia
Take This Job and Shove It					C* Embassy
Tattoo	(HBO)	ST*	TMC*		20th Century-Fox
Texas Lightning		ST			Film Ventures
The 13th Day					
The Story of Esther				HTN	Universal
This is Elvis		(ST)	TMC	HTN*	Warner Bros.
Three Days of the Condor			TMC		C Paramount
Three Warriors			(TMC)		C Zaentz
Tim		(ST)	(TMC)	HTN	Satori
Torch Song		ST			MGM/UA
Trilogy	HBO*	(ST)			Viacom
True Confessions	HBO	ST	TMC		MGM/UA
The V.I.P.'s					C* MGM/UA
Virus			TMC		Broadwood Prod.
Where the Spies Are		(ST)			C MGM/UA
Who Has Seen the Wind	HBO*		(TMC)		Janus
The Wild Geese	HBO				HBO
Zoot Suit		ST*	(TMC)		Universal

■ **Cable Network Legend**

HBO—Home Box Office
ST—Showtime
TMC—The Movie Channel
HTN—Home Theater Network Plus
C—Cinemax

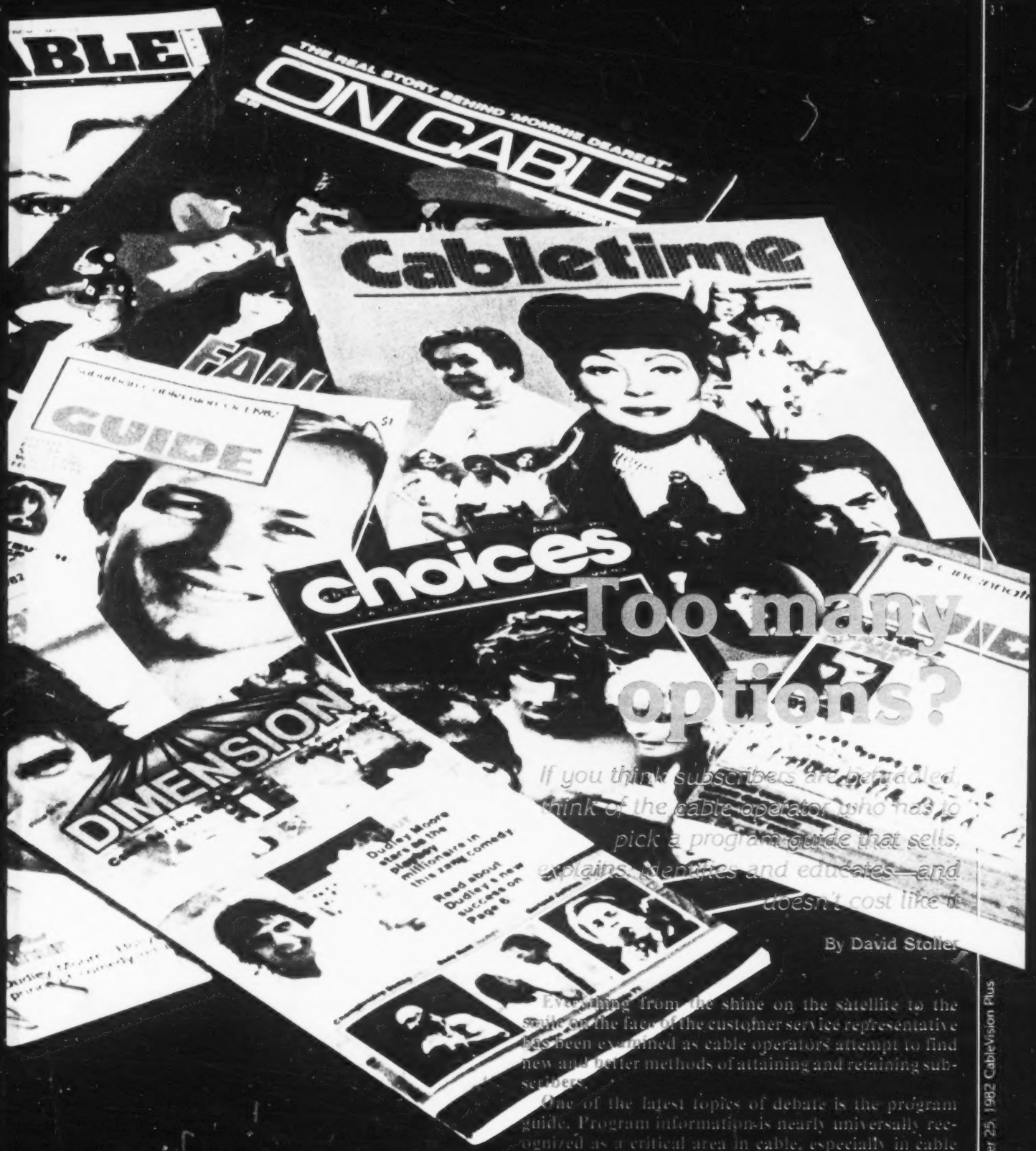
■ Networks in parentheses indicate carriage in June, July, August, September and/or October.

■ An asterisk following a network indicates the film is a carry-over from June, July, August, September and/or October.

■ In total, 191 films appear on the November schedules of HBO, Showtime, The Movie Channel, HTN Plus and Cinemax. Of those titles during the last six months (June-Oct. 1982), 11 films have appeared on four of the five services, 29 on three and 52 on two services. Ninety-two films are unduplicated.

■ The motion picture distributor to pay cable with the most titles featured this month is MGM/UA with 44, followed by Warner Brothers with 19 and Paramount with 18.

■ Burt Reynolds comedy "Paternity" is highlighted on the Showtime, HTN Plus, The Movie Channel and HBO/Cinemax program guide covers this month. As for HBO, their guide cover features "Ragtime," the Milos Forman drama shown exclusively on the pay network. Other movies featured on guide covers this month: "Rich and Famous" (HBO/Cinemax, Showtime, TMC) and "True Confessions" (TMC).



Too many options?

If you think subscribers are befuddled, think of the cable operator who has to pick a program guide that sells, explains, identifies and educates—and doesn't cost like it.

By David Stoller

Everything from the shine on the satellite to the smile on the face of the customer service representative has been examined as cable operators attempt to find new and better methods of attaining and retaining subscribers.

One of the latest topics of debate is the program guide. Program information is nearly universally recognized as a critical area in cable, especially in cable marketing. How can consumers or subscribers know and understand the many values of cable, such as

multiple channels and specialized programming, if they have no reliable sources? Without the vital information of what's on, when and why, cable subscribers—and potential subscribers—are in an electronic wilderness, aimlessly wandering around the dial.

And aimlessness is not what cable operators want. They want their subscribers to be more than just knowledgeable about their television viewing alternatives. Cable operators want to direct subscribers to the best and most profitable alternatives.

That's where the program guide comes into play.

According to Dan Davids, Group W Cable director of marketing services, the program guide is the "single most all-around and important marketing tool."

At the recent Eastern Show, Neil Heller, executive vice president of TVSM Inc., one of the major program guide publishers, echoed Davids almost to the letter. "The primary purpose of the guide," said Heller, "is not information—which is obviously very important—but marketing. . . The program guide is your image, your statement to the subscriber. It represents you in the way you want to be represented."

How it happened

How did the program guide become so important in the cable marketing scheme? Traditionally, the guide was just a bill stuffer, typically produced by the program supplier. Because the guide had to fit inside the bill envelope, weight, size and cost were the operators' primary considerations.

But as programming choices have increased, so has the importance of the guide.

Major MSOs today are reassessing the functions and formats of their guides.

Tess Spencer-Mohl, marketing research analyst, Storer Cable, says, "The guide is a very expensive undertaking, especially for a major MSO. The guide is really the only method we can use to put our name in front of the subscriber every day. It represents our image to subscribers. We can use it to reduce service calls, to put in helpful hints or the right phone numbers to call. It can prove to be a retention tool."

Spencer-Mohl is conducting a survey of 135 Storer Cable systems managers. She asked them how satisfied they were with their current guide, whether they wanted a pay-only, pay and satellite, or all-channel guide, and whether the guide should be weekly, biweekly or monthly. She also asked the managers to get reaction from subscribers, especially those who had been exposed to paying for their guides.

TCI's 'Cabletime' is designed specifically for its own systems and will, John Charlton hopes, give the company control that will help change viewing habits.

Other operators, including Cox Cable, Viacom and Liberty Communications are undergoing program guide evaluations.

Says Ron Lederer, Oregon's Liberty Communications corporate sales and marketing director, "We will seriously make a change to upgrade the quality of our guides, to have larger formats and more pictures and information."

According to Cindy Dennis, Cox Cable manager of marketing support, the MSO is moving toward using one standard guide in every system. Cox now is conducting both telephone and focus group research with subscribers, testing reactions to different guide styles and formats.

Viacom, which has used a number of outside suppliers, is investing in developing a long-term guide strategy, says Ed Bennett, senior vice president.

Bennett says the guide must go beyond just informing customers what is on cable. "It's a training manual. It can change viewing patterns and help maintain subscriber life and profitability."

More players

Every day, more players enter the two-year-old program guide business. TVSM, with 550 cable system clients and a 3,500,000 monthly print run, started its first multipay guide in Group W's (then Teleprompter) Maquoketa, Iowa, system in July 1980. The guide was 16 pages long and included both HBO and Showtime program listings. The print run was only 2,000 copies.

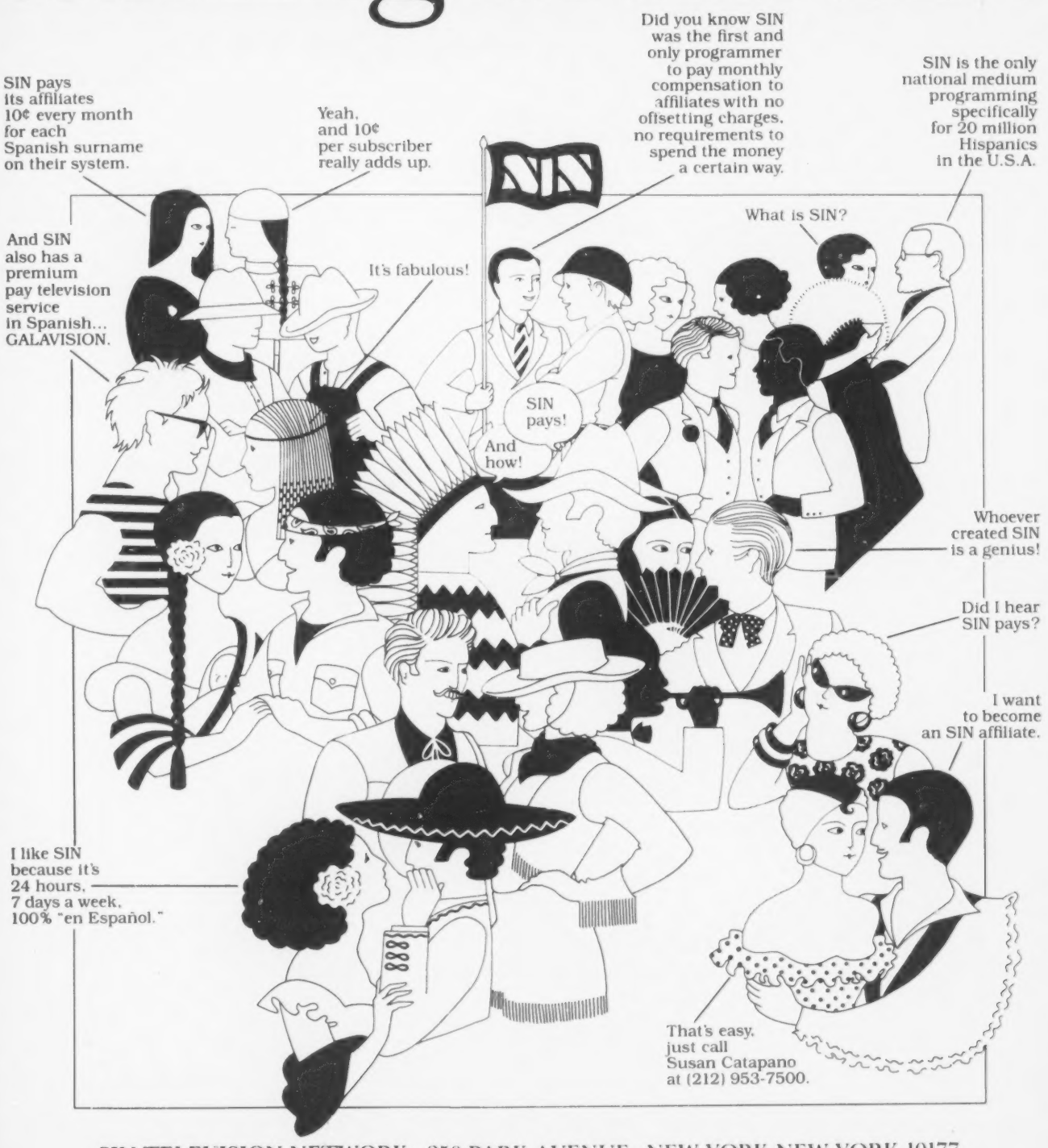
In those two short years, business has boomed.

There are about nine major program guide suppliers today. And that does not include proprietary guides produced by systems such as Group W Cable in Manhattan or Gillcable in San Jose, Calif., or the guides supplied by HBO, Showtime, etc.

Recently, Tele-Communications Inc. and Times Mirror announced plans to publish their own guides for all their systems as part of new marketing and programming strategies. And other operators may follow.

Still, perhaps the most dramatic entry into the guide business is the

Everybody's talking about SIN


SIN pays its affiliates 10¢ every month for each Spanish surname on their system.
Yeah, and 10¢ per subscriber really adds up.
Did you know SIN was the first and only programmer to pay monthly compensation to affiliates with no offsetting charges, no requirements to spend the money a certain way.
SIN is the only national medium programming specifically for 20 million Hispanics in the U.S.A.
What is SIN?
And SIN also has a premium pay television service in Spanish... GALAVISION.
It's fabulous!
SIN pays!
And how!
Whoever created SIN is a genius!
Did I hear SIN pays?
I want to become an SIN affiliate.
I like SIN because it's 24 hours, 7 days a week, 100% "en Español."
That's easy, just call Susan Catapano at (212) 953-7500.

SIN TELEVISION NETWORK 250 PARK AVENUE NEW YORK NEW YORK 10177

proposed 1983 debut of Time Inc.'s *TV-Cable Week*. Time plans to produce a weekly program guide including both cable and broadcast listings. The cover price will be 70 cents.

What's more, Time announced it is willing to spend $100 million to get a share of the business.

TV-Cable Week has hired Bob Bedell, HBO marketing vice president, to head up the sales and marketing for the new magazine.

Bedell's move to *TV-Cable Week* signifies Time's interest in making sure cable operators understand and identify with their new guide, just as they do with HBO, Cinemax and other Time cable products.

John Sie, Showtime senior vice president, has been one of *TV-Cable Week*'s most outspoken critics. Sie has expressed concern over what he describes as "unresolved" conflict of interest issues prompted by Time Inc.'s ownership of HBO and Cinemax.

At press time, John Sie said he was still waiting to be given a formal presentation of *TV-Cable Week*. He said he had requested the presentation as a "potential advertiser."

Sie is concerned with "possible editorial-promotional bias." He says that the reported "church and state" separation between Time's video and publishing groups is better described as a "church-state." He charges that HBO has been heavily cross-promoted in Time Life publications in the past and wonders outloud if that also will happen in *TV-Cable Week*.

While most cable operators aren't fretting about it, Sie says operators "wouldn't know" if *TV-Cable Week* was an unbalanced product.

"If they (operators) made money, they wouldn't care," he comments.

Bob Bedell answers John Sie's charges in a calm, almost matter-of-fact manner. "John Sie raises fair questions, but the fear is totally unfounded. *TV-Cable Week* is totally divorced from HBO Inc. and its products. Those brands will receive no better and no more treatment than any other basic or pay service, in either the editorial or listings sections."

What concerns operators is price—not the church-state debate.

John Charlton, TCI's vice president in charge of its new program guide, questions how many subscribers *TV-Cable Week* will accept a $2.80 a month subscription price. Charlton says that saturation levels will be too low at 70 cents per copy per week to be helpful to operators. "What does 20 percent penetration do for the cable operators?" he asks.

Adds Larry Miles, senior vice president of marketing and programming, Times Mirror, "We had two presentations from Time Inc. They want to do a national guide, a national magazine with major circulation to appeal to advertisers. Our objective is to inform our subscribers about cable."

Says Bob Bedell, "Our goal is to get the ultimate cable TV program magazine into the hands of consumers as soon as possible."

Bedell says the average cable subscriber uses more than two sources to get his total television program listings. That there is no one source angers subscribers. "Inevitably," Bedell says, the anger is "directed at the cable system."

'Our goal is to get the ultimate cable TV program magazine into the hands of consumers as soon as possible.'

Bob Bedell, sales and marketing manager, 'TV-Cable Week'

THE COMPLETE LISTINGS FROM TIME LIFE
TV-CABLE WEEK
DOLLY PARTON
THE QUEEN OF NASHVILLE CONQUERS HOLLYWOOD
CAPTAIN KANGAROO IS HOPPING MAD

Questions raised

The particulars of *TV-Cable Week*—its price, its weekly publication schedule and its listing of both cable and broadcast programming—raise fundamental questions over the purpose and the nature of the program guide. Should the guide be distributed free to all subscribers or should it be offered by subscription only to those willing to pay? Should only pay subscribers get the guide? Is the guide a revenue source or a loss leader? Should it be weekly, biweekly, monthly? Should it be limited to cable offerings or include off-air too? Should the operator publish the guide himself or seek an outside supplier?

According to Barry Moore of Cable Atlanta, speaking at the Eastern Show, if operators gave subscribers the guide they want, it would list all programming: basic, pay and broadcast and would "no question" be a weekly publication.

"What they (subscribers) would like to do," Moore says, "is open the guidebook and see that at 8:00 p.m. here are my 54 channels. I sincerely believe that is what they want to do."

Moore stresses that getting the ideal is a question of economic feasibility—a question of price.

The environment in the guide business will be significantly different in five years, Moore says. It will become more difficult for cable operators without large subscriber bases to produce guides themselves.

"I'm saying that there is a real question whether the cable company *per se* is going to have much of a

role in guides in five years. It is a very effective tool to communicate to your subscribers. I like to pop that letter in there that tells them things I want to tell them. I like being able to sell remotes through there, to put a sell-your-neighbor program through there, to have complete control and go to only my subscriber. But unless you control a whole SMSA, the whole economics of the business may drive you away from that."

Do-it-yourself

Barry Moore artfully expresses the dilemma of the smaller and individual cable operators. And he has taken his own advice. After several years of producing its own guide, Cable Atlanta is switching to an outside supplier.

But other operators are doing it themselves. TCI is publishing *Cabletime*, a monthly 8½ x 11" guide specifically designed for TCI sytsems and to relate to its national programming package. Times Mirror has *Dimension*, a 5 x 7" monthly guide. *Dimension* is an integral aspect of the MSO's new "Dimension" marketing plan. The guide will be offered in all Times Mirror systems by next June.

The issue of control is at the heart of TCI's decision to publish its own guide, according to John Charlton. Control is also inherently a part of Times Mirror's action. Both operators view the guide as an important marketing tool and believe publishing their own guides will help sales.

Larry Miles of Times Mirror says that outside suppliers were too inflexible for the operator's needs. "We had to fit their model," he grouses.

To keep control, Times Mirror went to Boston-based Jubilee Communications, a publisher, and formed a joint venture. Jubilee handles the nuts and bolts of publishing. Times Mirror has editorial control over the content and style.

TCI's Charlton says that control helps change viewing habits. He also states that for a guide to be a true marketing tool it should be free and available to all subscribers.

"Is it truly a marketing tool if it's not to everybody?" he asks.

But there is also a strong movement, particularly in new-build markets, to ask subscribers to pay. Some operators are even beginning to view the guide as a potential profit center.

Information on some major cable program guides

Guide	Publisher	Frequency	Subscribers
Cable Monthly	Cable Communications Media Inc.	Monthly	1,000,000
Cabletime	TCI	Monthly	500,000 projected for '83; 2,000,000 projected for '84
Cable Today and The Cable Guide	TVSM	Monthly	3,800,000 total
Cable Viewer's Guide	Cable Viewer's Guide Inc.	Weekly	100,000
Cableweek	Cableweek Inc.	Weekly	15,600
On Cable	On Cable Publications	Monthly	700,000
Program Guide	Mclean Hunter Inc.	Monthly	188,000
TV-Cable Week	Time Inc.	Weekly	figures not avail.
TV Host	TV Host Inc.,	Weekly	
TV Host	Cable TV Publications	Monthly	625,000
Premium TV		Monthly	

Warner Amex is selling *The Program Guide*, published by Toronto's Maclean Hunter, for $1.50 in Pittsburgh and Cincinnati and $1.25 in Dallas.

According to Warner Amex Vice President of Marketing Susan Couch, the cost of the guide is "not a revenue stream" but a "relative liquidator" that takes a few years to pay out.

Couch reports that there is little resistance from subscribers – especially new subscribers – to paying for the guide.

Couch says that the "toughest" decision was asking subscribers to pay for information. But, she states, by the end of 1983, more than half of the MSO's systems will sell their cable guide to offset costs.

Says Couch, "If it is a profit center, it becomes difficult to keep the guide's role as a marketing tool in perspective at this stage of the business. The guide is still an embryo. We don't have a cookie cutter yet."

Adds *On Cable* Publisher Peter Funt, "The guide can be both a profit center and a marketing tool, though not necessarily for all systems. You first have to be sure that it's a marketing tool. If you get carried away with revenue and you forget marketing, you've cut your nose to spite your face."

The next step

The future shape of cable guides is uncertain. The possibility of two-way, interactive, instantaneous program guides looms on the horizon, but most operators say that some printed product will be with us for many years to come.

Others already are predicting a shakeout in the program guide publishing arena.

On Cable Publisher Peter Funt says it is "reckless" to make predictions about such an "explosive" field. But Funt will say that simple multipay guides and program guides supplied by HBO, Showtime, etc. will "slowly disappear" and "all-purpose mass guides" will emerge to command the market.

TVSM Executive Vice President Neil Heller says guide publishers will have to expand their services to operators in order to survive. "Retention is now a key. The guide has to keep the subscriber satisfied. It has to reinforce as well as explain the service."■

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